You wait twenty years for a new LMS and then two come along at once ...

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At Kingston University we have just implemented our second library management system (LMS) in just under three years. As a result, you might consider writing this article to be some form of group therapy – far from it! We have found ourselves in the privileged position of being able to learn from our experiences and put some of those lessons into practice. With so many libraries embarking on this type of project, we felt that there was value in sharing our experience.

Why so many changes?

First, some background as to why we have implemented two library management systems in such a short time. Like many institutions, we had been with the same library management systems company since the year dot. With the growth in digital material, we had bolted on various third-party tools, which had created what one colleague described as a patchwork quilt of systems administration. Whenever the stitching failed, this contributed to the growing tide of dissatisfaction from both a staff and student perspective. In particular, locating e-content was a growing challenge involving a combination of Talis Prism, AquaBrowser, 360 Search and a SharePoint list. This entirely unsatisfactory position led us in 2010 to embark on a full OJEU (Official Journal of the European Union) tender for a single new system that would meet all our requirements and place us in a stronger position to manage the digital future. Our winning tender was from Ex Libris who, at that stage, at least offered a package that would interact seamlessly (a suite of fully integrated products: Aleph, Primo, Metalib, SFX, Verde). However, it was with some astonishment that we read the announcement of the launch of their new product, Alma, only days after signing our contract. With its seamless approach to managing print and digital resources, in many respects it was the product that we had hoped to find during our tender – what bad timing on our part! However, amendments to contract enabled us to agree to migrate from Aleph to Alma when we felt the new product was sufficiently mature. This met our obligation to the university to deliver an improved student experience through an integrated discovery tool alongside a commitment to cost reduction while also enabling us to upgrade to the latest technology when the time was right.

Novelty factor

For some staff it came as quite a shock that we really were thinking of taking our custom elsewhere. Suddenly a system that was unloved began to regain some of its popularity. This may have been partly due to the fact that, in appearance, we were switching to a system that looked broadly similar to what we were already using in terms of its staff-facing functionality. Had we been transferring to Alma immediately, this would have been seen as a significant change. For other staff, the system change was seen as an exciting opportunity to provide input into the biggest departmental project for many a year. Initially we adopted a very inclusive approach, with teams examining the requirements lists for their area; but there came a crunch point when all that feedback had to be analysed and refined into something that a potential supplier could actually respond to. So the first lesson we learnt was about maintaining a subtle balance between consulting with a wide range of staff while ensuring that we could still produce a focused and meaningful tender specification. Involving so many staff in the early stages built an expectation that they could be involved in every stage of the project, which just wasn't feasible. On reflection, providing a draft calendar indicating the points of engagement for different groups of staff could have provided clarity and managed expectations. When we launched our Alma project, the novelty factor had worn off, but there was also more of a sense of projects being embraced as business as usual.

Procurement

Our procurement was done via a full OJEU tender, a process with which many of you will be familiar but on which I suspect very few librarians would

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claim to be experts. From discussions with other institutions, it appears that procurement teams run with different nuances, which can be confusing for those relatively new to the process, and we certainly found ourselves questioning just how much training in this area key library staff now require – after all, there is a lot at stake and none of us want accidentally to bring our institutions into disrepute with a tendering blunder! Better advice on how to prepare a marking and evaluation scheme for the submissions would have been welcome. Subsequent to our procurement experience, we did propose this to our Central Finance team as an area for staff development, particularly for senior managers who need to have a moderate grasp of the process. This training has not materialised and it would be interesting to know if other universities offer something similar.

Our project teams

What we have learnt is that it is very easy to refer to the 'project team', whereas the reality was at least two teams with a number of sub-groups.

Initially we expected procurement and implementation to be carried out by the same team, but we should have recognised earlier that not everyone would necessarily need to follow the whole process through from beginning to end. Whilst there were overlaps between procurement and implementation, regarding them as different teams would have provided more flexibility and enabled us to have a smaller, more targeted procurement / selection team. This would have been a distinct advantage when carrying out site visits, as finding suitable locations and dates for a team of ten plus felt more like mobilising an army. Admittedly the challenge was exacerbated by unseasonably early snow and a London tube strike!

When it came to assembling the team for the Alma implementation, the majority of the original project team were still in place. One or two new faces joined the team but essentially the whole experience felt much more calm and measured, with staff being able to anticipate what was required second time around. There was increasing emphasis on the 'project team' being a steering group which then reached out to other staff with expertise in specific functional areas.

Love your project manager

Our LMS replacement project was the first large corporate systems project for some years, during which time the university had made its first tentative steps towards a more structured project management approach. When we came to carry out the upgrade to Alma in the summer of 2014, our project governance had developed significantly.

Back in 2010, being assigned a project manager was a novel experience and one that was eyed with some suspicion by some of the team members in the first instance. However, as the project progressed, a great respect for our project manager's skills emerged. The project team appreciated her rigour in setting up meetings, pulling together reports and, most importantly, in negotiating resource from non-library teams whose input was essential to the success of the project.

For the 2014 Alma upgrade the entire team waited in anticipation to see who would be assigned as our project manager and fully embraced the approach of this new person joining the team. Organisational change meant that we were now implementing this project within a deconverged department and a very recently implemented project governance structure that presented its own challenges to non-Prince2 practitioners. However, working with our project manager continued to be a positive experience as whenever a crisis arose she was able to maintain objectivity in a way that was less possible for staff directly affected by the change.

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Keep the comms coming

Communication is always the challenge of any big project. Too much and everyone switches off, too little and everyone complains that they don't know what is going on. For both projects communications fell into three key areas – communication within the team, communication within the department, and communication across the university.

Within the project team itself, we needed a quick way to ensure that any library staff could contact the project team at any time and a shared email distribution list proved a simple but effective solution. Sharing all our internal documentation on a SharePoint project site also ensured everyone was looking at the latest version of documents. As well as project documentation, testing schedules, training calendars and user guides were all kept here. However, it wasn't possible for the Ex Libris staff to access this site, and so for the Alma project a Basecamp[1] site was created. This facilitated the sharing of documentation whilst enabling questions and queries to be resolved via discussion boards.

Within the department, a project newsletter was launched; it was circulated monthly to begin with but became more frequent as the go-live date approached. On the first project, I handled this work as a key stakeholder but without a specific work area to implement. However, for the second project we decided to involve two members of staff who also did not have a specific work area to implement and who could therefore keep an overview and write from the end user perspective. A project blog would also have been a good alternative.

For both projects we created a Comms Plan that identified internal departmental communications as against external university-wide engagement. Just listing all the potential stakeholders and identifying the most effective channel for reaching them was a valuable exercise. It also made us question exactly what was required. For example, we kept university-wide communications for the Alma upgrade to a minimum as we were hoping for a smooth transition that most staff and students wouldn't really notice. Our biggest university-wide communication with Alma was celebrating its success and ensuring the team received recognition for delivering a very successful project via the staff portal announcements.

Testing, testing, 1,2,3

Migrating data from one supplier to another was inevitably more complex than migrating to a new product with the same supplier. Testing with your own data is critical to the success of the project, but technical issues with our first project meant that we had very limited time to do this and, despite our best efforts, trying to simulate how our data would behave just wasn't good enough. We spent the first month after go-live finding and correcting problems in our circulation parameters, learning the hard way that our testing should have been far more rigorous.

Our Alma testing was managed to the finest detail by our project manager, and although our test log listing every possible scenario in every module looked very daunting, it was essential in ensuring that day one after the switchover ran smoothly. The data migration aspect was easier but still, encouraging staff to spot what isn't there (as against whether what is there is correct) was a skill in itself.

Integrations with other IT systems were inevitably complex, but are an area that we greatly underestimated first time around. Ensuring our student data imported correctly into Aleph absorbed over 500 hours of IT staff time. However, the tools to support systems integrations are becoming less complex: the same task for the Alma project took much less time and we were even able

to tackle integration with the university's online payment system as an added bonus within the project.

Prepare for the big day

This could be summarised as training, training and more training. First time around, our project suffered from tight time constraints, which meant that we had little choice but to adopt a very hurried 'sheep-dip' approach. Equally, the resources provided by Ex Libris were relatively unsophisticated, whereas for Alma they were much improved with an extensive range of webinars that supported on-site meetings. Learning from our previous experience, our project manager for Alma created a tracking tool to ensure that everyone received the appropriate training and she constantly pushed and sent out reminders to ensure that each module was completed on time.

Being a multi-campus institution brought additional challenges to the 'go-live' day. Ensuring that messages were passed on promptly was very important. However, feedback we received when preparing for Alma was that sites remote from the project team had previously felt uncertain as to what was happening, so we agreed that, for Alma, a member of the project team would be on hand at each site and that they would then provide a single point of contact back to the systems staff.

It is also important to bear in mind that 'go-live' day is not the end of the project. There will be teething troubles, and all new systems and working practices need time to embed and become 'normal', so don't immediately plan to go on holiday! Make sure you schedule time for resolving immediate issues and then time to reflect on the project.

Celebrate!

It was with huge relief that we reached our original Ex Libris installation date and survived it. Our original procurement delays had knocked a whole month out of our original schedule and so everything was being done in double quick time. Contractual obligations meant that, without Hermione Grainger's Time Turner,[2] the team could only work furiously to turn around all the necessary tasks. The pop of a champagne cork as 'go-live' was announced brought smiles all round (as did the chocolate cake!). When the Alma go-live day dawned, everyone was clearly much calmer, more confident and anticipating a successful outcome, which, in itself, demonstrated the lessons, we had learnt.

Key reasons for success

Reading back over our End of Project report for the Alma migration, I was interested to see that our project manager had listed the following as key reasons for the success of our project:

- the allocation of sufficient team members with the right expertise,

- allowing an adequate amount of time to do the project,

- previous experience of the team,

- support at the senior level so that decisions were made in a timely fashion and escalated when necessary,

- strong teamwork.

Outcomes for our students

The fundamental driver behind both of these projects was to improve the student experience. We wanted a discovery interface that was user friendly, met the expectations of the Google generation, and that saw the library as a single resource rather than compartmentalised collections of print and digital. This has certainly been achieved and now, with our second implementation complete, the improved staff functionality means that we are able to deliver

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resources to our students more efficiently, all of which helps to underpin the excellent service we aim to provide.

Note: Use of the first person refers to Elizabeth Malone.

References

1. Basecamp. Available from: https://basecamp.com/ [accessed 16 February 2015]
2. Rowling, J.K., (1999) *Harry Potter and the Prisoner of Azkaban* London, Bloomsbury